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FACT FILE

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Market Research Division
Fairchild Publications, New York

**Dresses
(Women's, Misses'
and Juniors')**

FAIRCHILD FACT FILE

Prepared by

Market Research Division

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WOMEN'S, MISSES' & JUNIORS' DRESSES

Market Trends

Overall statistics for the dress industry in the U.S. for 1983 showed a continuance in the downward trend in U.S. production and in the rise in imports. At the retail level, however, business has been strong in some classifications, particularly in better lines, and trade reports indicate optimism for a good 1984.

According to an analysis of trade trends in Stores (April 1984) which is published by the National Retail Merchants Association, planned increases among key stores for dress departments ranged from 20-50% for the year in many cases. Strength in dress business in the last couple of years has been mainly in career-oriented, conservative styles for working women. However, as the economy has improved and as women have gained more confidence, greater interest is being shown in dressy, after-five clothes. This market is also benefitting from the increasing number of women in management positions who require a larger wardrobe of dresses for a variety of occasions.

The working woman is the backbone of the dress market and the industry is being stimulated not only by their interest in dressier clothes but also by a swing to dresses away from tailored suits for a softer look and for variety. Also away from separates due to the greater ease in dressing offered by dresses as well as offering a less costly way of getting a total look.

Confirmation of the view that dresses will continue to come back from their low points of the 1970's is noted in the fact that some sportswear manufacturers are now also making dresses. Their younger sportswear customers are now being exposed to dresses. Designers and dress manufacturers have stepped up efforts to capture this important younger market, bringing out new fabrications and looks to fit their lifestyles. New shorter lengths are the fashion message for spring 1985, which should bring the need for wardrobe refurbishing for dresses and skirts.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census. Preliminary findings on the dress industry, 1982 census, should be released by the Bureau before the end of 1984.

During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on this information, the U.S. Bureau of Industrial Economics (in U.S. Industrial Outlook 1984) has issued estimates on dress industry shipments for 1982 and 1983 (which are subject to revision when later Census Bureau data comes out). In terms of current dollars, shipments for 1982 were valued at \$4,930.4 million--7.9% above the 1981 total. For 1983, the value was estimated at \$5,030--a gain of 2.0% over 1982.

GENERAL INDUSTRY STATISTICS

On a constant (1972) dollar basis, eliminating the effects of inflation, shipments in 1982 registered a real gain estimated at 5.7% over 1982, but were 8.7% below the 1972 comparable total. The estimated value of shipments in 1983 on a constant dollar basis was 6.1% below the 1982 level.

Industry shipments from 1972-1983 registered an annual compound rate of growth of 3.1% (current dollars); when measured on a constant dollar basis, however, shipments declined at an annual rate of 1.4% in this period.

Women's, Misses' & Juniors' Dress Industry (SIC 2335*)

	<u>1981(r)</u>	<u>1980</u>	<u>1977</u>
Number of companies	na	na	6,753
Number of establishments, total**	3,648#	4,038#	6,953
Employees, total (thous.)	166.0	176.3	175.3
Production workers (thous.)	144.7	152.0	153.0
Payroll (mil. \$)	\$1,377.2	\$1,359.8	\$1,197.1
Value added by manufacture (mil. \$)***	\$2,519.0	\$2,472.5	\$2,233.7
Value of industry shipments (mil. \$)##	\$4,569.6	\$4,405.6	\$4,188.6
Capital expenditures, new (mil. \$)	\$ 110.0	\$ 50.5	45.2

(r) revised

*SIC (Standard Industrial Classification) 2335 covers establishments primarily engaged in manufacturing women's, misses', and juniors' dresses of all types, including ensemble dresses and pants dresses, whether sold by the unit or by the dozen (daytime house dresses).

**Each business location is counted as a separate establishment. For 1977, the 6,953 establishments in the dress industry included 4,347 manufacturers (regular or inside factory), 462 jobbers (who arrange with contractors to manufacture for them, the jobber supplying the material), 2,144 contractors (outside factories which process materials owned by others, and do not sell the finished garment).

***Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

#Covers establishments with paid employees only, as reported in County Business Patterns.

##Value of industry shipments of the dress industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in this industry. Figures on shipments of dresses by all producers, including those classified in other industries, are shown on page 8.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Annual Survey of Manufactures, 1980, 1981.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Customer interest in dresses has picked up somewhat in recent months, and this is reflected in employment figures. In each of the first six months of 1984 employment was above the comparable month a year ago. However, the industry has a long way to go to catch up with the rate of activity some years ago. In 1983, employment averaged 124,700, 24% below the average of 163,500 reported for 1977. (It will be noted that employment figures compiled by the Bureau of Labor Statistics and those issued by the Census Bureau differ due to a different methodology involving averages for selected months used by the Census Bureau rather than a twelve-month average.)

Employment & Earnings in the Dress Industry

	January - June			Annual Average			% Change 1983/1982
	1984(p)	1983	% Change	1983	1982	1977	
Women's & misses' dresses (SIC 2335)							
All employees (thous.)	129.8	124.9	+ 3.9%	124.7	127.9	163.5	- 2.5%
Production workers (thous.)	109.7	107.5	+ 2.0	106.9	111.0	144.2	- 3.7
Avg. weekly earnings	\$187.38	\$177.97	+ 5.3	\$108.73	\$169.37	\$122.34	- 35.8
Avg. hourly earnings	5.63	5.43	+ 3.7	5.51	5.26	3.73	+ 4.7
Avg. weekly hours	33.3	32.8	+ 1.5	32.8	32.2	32.8	+ 1.9

(p) preliminary

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings.

In 1981, there was a total of 3,648 establishments with payrolls which were primarily manufacturing dresses in the U.S. compared with 4,038 reported for 1980, according to the Census Bureau's County Business Patterns report. Eighty percent of these establishments employed fewer than 50 people while only 6.9% were relatively large plants with 100 persons or more.

The Women's Dress Industry by Employment Size, 1981

	Establishments	
	Number	% of Total
Women's & misses' dresses (SIC 2335)	3,648	100.0%
By establishment size:		
Under 10 employees	927	25.4
10-19 employees	753	20.7
20-49 employees	1,238	33.9
50-99 employees	478	13.1
100 or more employees	252	6.9

Source: U.S. Bureau of the Census,
County Business Patterns, 1981

GENERAL INDUSTRY STATISTICS

Employment & Earnings

In industry projections for the year 1983, published by Sales & Marketing Management Magazine (1984 Survey of U.S. Industrial & Commercial Buying Power, April 24, 1984 issue) the number of plants with 20 or more employees was estimated at 1,169 and shipments for the year by these plants were reported at \$4.2 million, of which 59% was accounted for by large plants, having 100 or more employees.

Regional Location

According to the U.S. Bureau of Industrial Economics, major producing states accounting for the largest percent of dress industry shipments included the following: New York (42%), California (17%), Pennsylvania (8%), Texas (4%), New Jersey (4%).

Detailed information by state, etc., will be available when 1982 Census of Manufactures reports are completed. Sales & Marketing Management magazine has developed information on plants with 20 or more employees in leading counties, as noted below:

Leading Counties in the Manufacture of Dresses, 1983

	No. of Plants		Shipments By Plants With 20+ Employees	% of U.S. Total
	With 20 or More Employees	With 100 or More Employees		
New York				
New York City (Manhattan)	165	19	\$ 345.8	8.3%
California				
Los Angeles	55	6	150.2	3.6
Pennsylvania				
Lehigh	9	4	43.6	1.0
Montgomery	7	4	40.3	1.0
Philadelphia	21	7	98.9	2.4
Schuylkill	20	7	106.7	2.6
Florida				
Dade	42	4	90.7	2.2
Illinois				
Cook	17	4	68.5	1.6
Kane	1	1	52.5	1.3
Massachusetts				
Bristol	26	15	179.8	4.3
New Jersey				
Bergen	16	3	52.6	1.3
Texas				
Dallas	33	18	238.4	5.7
U.S. total	1,169	296	4,168.4	100.0

Source: Sales & Marketing Management Magazine (April 24, 1984)
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PRODUCTION

In the first six months of 1984, according to the U.S. Bureau of the Census, production of dresses for women, misses and juniors was down 8.3% compared with cuttings in the same 1983 period. Output in the entire year 1983 compared with 1982, according to the Bureau, registered a 2.7% decline.

The Research Department of the International Ladies' Garment Workers' Union, New York, has compiled information on dress production based on Census Bureau data which has been adjusted to include output of very small firms which are not included in the government data.

The ILGWU data shows the steady decline in U.S. production of dresses, and for the first time in over 25 years the total fell below 200 million units in 1983. At an estimated adjusted total of 197.5 million units, dress production last year was 28.3 percent below the 1973 total.

The Trend in U.S. Production of Women's, Misses' & Juniors' Dresses

<u>Year</u>	<u>Millions of Units</u>	<u>Index (1973 = 100)</u>
1973	275.5	100.0
1979	247.2	89.7
1980	252.8	97.8
1981	218.4	79.3
1982	203.1	73.7
1983	197.5	71.7

Source: ILGWU Research Department

Collection of monthly apparel industry information in the Current Industrial Reports series was reinstated in 1983 by the Census Bureau, after having been eliminated in 1982. Annual CIR's on apparel have been continued. These are based on mail surveys among manufacturers, contractors and jobbers, including all known companies except very small firms.

Dress production in 1983 compared with 1982, based on Census Bureau coverage of the industry, is summarized in the following tables. Included are dresses cut in the U.S., sewn abroad, and shipped back as finished garments under the provisions of item 807.00 of the Tariff Schedule.

PRODUCTION

U.S. Production of Dresses & Washable Service Apparel by Fabric Construction
& by Factory (Wholesale) Prices of Dresses, 1982, 1983
 (Thousands of Units)

	<u>1983</u>	<u>1982</u>
Women's, misses' & juniors' dresses*	167,046	171,748
By price (per unit):		
Under \$6.00	5,202	8,898
\$6.00 - 9.99	20,060	22,818
\$10.00 - 15.99	51,430	48,283
\$16.00 & over	58,020	55,320
Price line, n.s.k.	32,334	36,429
By fabric:		
Woven fabric:		
All or chiefly cotton	18,006	17,042
All or chiefly man-made	81,341	79,442
All or chiefly wool	1,499	2,165
All other fabric	5,509	4,831
Knit fabric:		
All or chiefly cotton	1,804	2,562
All or chiefly man-made	29,525	34,509
All or chiefly wool	651	804
All other fabrics	445	136
Fabric, n.s.k.	28,266	30,257
Washable service apparel, including uniforms, medical & lab jackets, etc.	39,336	40,860
By construction:		
Woven fabric	21,828	20,136
Knit fabric	7,464	9,624
Construction, n.s.k.	10,044	11,100
By fabric:		
All or chiefly cotton	3,684	3,840
All or chiefly man-made	25,164	26,184
All other fabrics, including fabric, n.s.k.	10,488	10,836

n.s.k. not specified by kind.

* Includes suit-type dresses, formal, work, house, bridal, etc.

Source: U.S. Bureau of the Census,
 Current Industrial Reports,
Women's and Children's Outerwear, 1983.
 (MA23F(83)-1)

PRODUCTION

Seasonality in Production

Dress cuttings in U.S. plants are typically at a peak in March/April, declining to a low point in December.

Percent of Year's Cuttings of Dresses by Months, 1980, 1981, 1983

	<u>1983</u>	<u>1981</u>	<u>1980</u>
Total dress cuttings	100.0%	100.0%	100.0%
By month			
January	8.4	8.3	9.5
February	9.4	9.6	10.4
March	11.4	11.1	10.8
April	10.1	10.0	10.3
May	9.3	8.8	8.8
June	8.5	8.9	9.2
July	6.8	7.5	7.7
August	7.6	8.4	7.8
September	7.6	8.2	7.1
October	7.5	7.3	7.1
November	7.2	6.0	5.8
December	6.1	5.9	5.5

Source: U.S. Bureau of the Census,
Current Industrial Reports.

SHIPMENTS

The annual surveys of manufactures (ASM) compiled by the Census Bureau are based on a sample of manufacturers, jobbers and contractors of women's wear and thus provides broader-based information on the value of dress shipments than the Current Industrial Reports series. Differences in the two series also occur due to variations in product classifications and reporting procedures.

There are several different sources of information on the value of shipments in the dress industry, all emanating from the U.S. Department of Commerce or from the ILGWU--and none of them in agreement, as methods of compilation differ.

The most definitive information on this, and other aspects of the dress industry, will be made available by the Census Bureau in final reports on the complete 1982 census of manufactures scheduled for release in 1984-1985. Preliminary results from this source show the value of dress shipments at \$2,995.5 million in 1982; women's washable service apparel, at \$2,296.9 million.

A trend in both current dollars and constant dollars for dress shipments is available from the Bureau of Industrial Economics as noted in the following table:

SHIPMENTS

Value of Dress Shipments by All Producers, 1972-1983 (Millions of Dollars)

	<u>1972</u>	<u>1977</u>	<u>1979</u>	<u>1981</u>	<u>1982(e)</u>	<u>1983(e)</u>	Compound Annual Rate of Growth <u>1972-83</u>
Current \$	\$2,806.5	\$3,228.2	\$3,030.1	\$3,394.0	\$3,613.9	\$3,673.5	+ 2.5%
Constant \$ (1972)	2,806.5	2,787.7	2,457.5	2,415.7	2,529.0	2,365.1	- 1.5

(e) estimated

Source: U.S. Department of Commerce, Bureau of Industrial Economics,
1984 Industrial Outlook

The complete census of manufactures is compiled every five years by the Census Bureau. In interim years an annual survey of manufactures (ASM) is taken among a sample of manufacturing establishments to provide trend information. In another effort, the Census Bureau compiles monthly and annual data on production and shipments of apparel in the Current Industrial Reports series. Data from both of these sources is subject to revision when final figures from the 1972 census are available.

Information from the most recent ASM and CIR reports follows.

Value of Shipments of Dresses & Washable Service Apparel, 1979-1981 (Including Contract Work) (Millions of Dollars)

	<u>1981</u>	<u>1980</u>	<u>1979</u>
Women's, misses' & juniors'			
dresses, total	\$4,357.5	\$4,277.9	\$3,926.9
Unit price dresses	2,434.7	2,464.1	2,363.2
Dozen price dresses	413.8	357.3	334.3
Contract work on dresses	963.3	970.2	896.7
Dresses not specified by kind	545.7	486.3	332.5
Washable service apparel	215.4	205.8	216.8

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures (M81 (AS)-2).

The CIR reports are based on a survey of manufacturers, government contractors and jobbers, except small firms. Data since 1981 has been revised and may not be comparable with 1981 and earlier years.

SHIPMENTS

Value of Shipments of Dresses & Washable Service Apparel, 1982, 1983 (Millions of Dollars)

	<u>1983</u>	<u>1982</u>
Women's, misses' & juniors' dresses, total	\$3,375.9	\$3,186.2
Washable service apparel, incl. uniforms, medical & lab jackets, smocks, etc.	269.2	254.0

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA23F(83)-1)

The Research Department of the ILGWU adjusts CIR data for underreporting and arrives at an estimated value of shipments of dresses of \$3,963 million in 1983, \$3,740 million in 1982.

PRODUCER PRICE TRENDS

As of June 1984 the producer (factory) price level for women's unit-priced dresses averaged less than one percent (+0.3%) above the price level in the same month a year earlier. Compared with the average for the year 1982, prices were up an average 1.8% in June 1984.

Producer Price Index on Women's Dresses, 1981, 1982 Annual Averages, June 1983, 1984 (1967=100, unless otherwise indicated)

	<u>June</u>		<u>%</u>	<u>Annual Averages</u>	
	<u>1984</u>	<u>1983</u>	<u>Increase</u>	<u>1982</u>	<u>1981</u>
All commodities	313.4	302.4	+ 3.6%	299.3	293.4
Women's apparel	178.3	177.5	+ 0.4	173.1	164.4
Dresses (unit-priced) (Dec. 177=100)	126.5	126.1	+ 0.3	124.3	121.3

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The U.S. Bureau of Industrial Economics has estimated the value of imports of women's and misses' dresses in 1983 at \$281.9 million, gaining 70.8% in current dollar terms compared with the 1982 total. The valuation is defined as the "customs value", or the price actually paid for merchandise when sold for exportation to the U.S. Charges incurred in bringing the goods to the U.S., as well as duties, are not included.

The value of U.S. exports of women's and misses' dresses, on the other hand, declined 39%. The drop reflected the strong U.S. dollar which made U.S.-made dresses more expensive overseas, as well as the lagging economies in many foreign countries. The export value was the lowest reported since 1977. However, the Bureau finds that in the 1972-1983 period the value of dress exports grew at a compound annual rate of 8.0%.

FOREIGN TRADE

Estimated U.S. Trade in Women's & Misses' Dresses, 1979 & 1981-1983 (Millions of Dollars)

	<u>1983</u>	<u>1982</u>	<u>1981</u>	<u>1979</u>
Value of exports	\$ 33.5	\$ 55.0	\$ 62.8	\$ 39.0
Value of imports	281.9	165.0	198.7	102.1
Export/shipments ratio*	0.009	0.015	0.019	0.013
Import/new supply ratio**	0.072	0.044	0.056	0.033

* Not adjusted for inclusion of shipping costs in the export value.

** New supply ratio is the sum of product shipments plus imports. (This reads: imports accounted for 7.2% of new supply).

Source: U.S. Bureau of Industrial Economics,
1984 U.S. Industrial Outlook

The U.S. Census Bureau has compiled an overall summary of the impact of foreign trade on the entire dress industry (including women's, girls' and infants'). According to this analysis, imports in 1983 represented 14% of the quantity of apparent consumption (total domestic supply including production, less exports plus imports). This was down from 18.4% in 1982. In terms of value of dresses, imports accounted for 8.9% of apparent consumption in 1983, down from 11.6% in the previous year.

Exports by U.S. producers were down somewhat in terms of share of total shipments. Quantity of exports dropped from 8.2% of total shipments in 1982 to 6.9% in 1983. In share of value of shipments (not including charges involved in moving shipments to the port of export), the 1983 figure of 1.1% compared with 1.8% in 1982. (U.S. Bureau of the Census, Current Industrial Reports).

Imports

Based on customs receipts, the Bureau of the Census compiles regular reports on imports. Information on dresses covers all types, including dresses for women, children and infants, which are not separately reported. The quantity of dresses of woven fabrics imported by the U.S. in 1983 was 46% above the 1982 total; value rose about 64%. The quantity of knit dress imports is not reported; however, value rose over 34%.

FOREIGN TRADE

ImportsU.S. Imports of Women's, Girls' & Infants' Dresses, 1982, 1983

	Quantity (Thous. Dozens)		Value C.I.F. (Thous. \$)		% Change in Value 1983/1982
	1983	1982	1983	1982	
TOTAL, reported categories	na	na	\$6,248,010	\$5,078,857	+ 23.0%
DRESSES	na	na	310,519	192,265	+ 61.5
Not knit	2,525.1	1,729.6	263,404	160,803	+ 63.8
Cotton	864.3	677.4	71,319	49,363	+ 44.5
Wool	26.5	9.7	10,290	4,607	+123.4
Man-made	1,440.8	914.9	116,706	58,398	+ 99.9
Silk	193.5	127.6	65,089	48,435	+ 34.4
Knit	na	na	47,115	31,462	+ 49.8
Wool	na	na	13,722	5,893	+132.9
Man-made	335.5	241.3	20,485	16,386	+ 25.0
Cotton	161.9	105.3	12,908	8,183	+ 40.6

na not available. (reported in terms of pounds only).

- * The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135, December 1983. 1982.

According to the Research Department of the ILGWU imports of women's and children's dresses totaled 30,993 thousand units in the first seven months of 1984, gaining almost 29% over the total of 24,088 thousand in the same 1983 period.

The ILGWU reported total imports of dresses at 37,286 thousand in 1983, which was more than double the total of 18,178 thousand units imported five years earlier (1979). Imports in the dress industry, as well as other categories of women's and children's wear, constituted a major problem to the domestic industry, particularly as they have continued to soar in 1984 despite government actions to stem the tide. The effort, covering a revision of the rules of origin, is expected to have a greater effect on knit imports than items of woven fabrics which may be cut in one country and sewn in another.

Mainland China, the Philippines, India, Pakistan and Hong Kong are large suppliers of dresses (other than knit) to the U.S. market.

FOREIGN TRADE

ImportsImports For Consumption in the U.S. by Leading Country of Origin, 1983

	<u>Thous. Dozen</u>	<u>CIF Value*</u>
Women's & children's dresses (selected types)		
Not knit:		
Cotton, total**	860.0	\$ 64,692
India	282.9	18,778
China (Mainland)	108.8	5,392
Pakistan	80.3	3,112
Man-made fibers, total**	1,454.1	107,534
Philippines	375.3	9,363
China (Mainland)	348.7	15,304
Hong Kong	189.2	26,346

* See footnote on previous table.

** Includes countries not separately listed.

Source: U.S. Bureau of the Census, U.S. General Imports
& Imports For Consumption (FT135, Dec. 1983)ExportsQuantity & Value of Women's Dresses Exported by the U.S., 1983
Total by Type & Leading Country of Destination

	<u>Dozen</u>	<u>Value*</u>
Women's cotton dresses		
Knit, total	49,094	\$2,910,905
Neth. Antilles	11,669	542,277
Panama	4,371	542,896
Colombia	6,314	383,030
Woven, total	124,002	5,444,366
Haiti	39,383	734,988
Colombia	18,196	1,439,030
Neth. Antilles	15,387	800,907
Women's man-made fiber dresses		
Knit, total	115,402	4,487,084
Neth. Antilles	14,985	1,147,590
Canada	40,474	1,128,073
Mexico	36,637	1,031,722
Woven, total	714,971	7,767,276
Mexico	626,762	5,508,327
Haiti	33,757	828,383
Kuwait	20,826	636,960

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Women's Dresses Exported by the U.S., 1983
Total by Type & Leading Country of Destination
(continued)

	<u>Dozen</u>	<u>Value*</u>
Women's & children's dresses, wool		
Knit	5,373	\$ 736,678
Neth. Antilles	1,306	170,433
Canada	604	73,816
Venezuela	442	72,096
Woven	6,490	468,849
Canada	1,423	143,655
Saudi Arabia	3,497	160,031

* Value alongside the carrier at U.S. port of exportation. It does not include the cost of loading the merchandise aboard the carrier, freight, insurance and other charges beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports, Schedule E (FT 446/Annual 1983)

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Within the next 10 years the size of the female population over 15 years of age will increase by over 9%, reaching close to 104 million compared to the present count of 94.3 million. By the year 2005 the number will be almost 20% above the 1984 total.

However, there are significant variations in the growth rate by age components. Reflecting the decline in the birth total in recent years, the number of younger women, age 16 to 19, will actually decline by 1994, dipping 13%, but will pick up again by the year 2005. The number of women aged 20 to 24 years will decrease 19%, dropping from 10.7 million to 8.7 million. The number age 25 to 29 will decline 12%, from 10.7 million in 1984 to 9.4 million by 1994.

Growth will be noted among age groups continuing to expand as a result of the baby boom years. Women age 30 to 34, 35 to 39 and 40 to 44 will show gains in number of 12.1%, 26.4% and 23.4%, respectively, by 1994. These are women characterized by a high percentage of career women, with peak earnings, who represent the best customers for dress departments.

THE POTENTIAL MARKET

Female Population of the U.S., 1984 & Projections to 2005* (In Millions)

	Number (Thousands)			% Change 2005/1984	Percent Distribution		
	1984	1994	2005		1984	1994	2005
Total, all ages	121,343	132,251	141,381	+ 16.5%	100.0%	100.0%	100.0%
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984)

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services (formerly called the U.S. Department of Health, Education & Welfare) and the U.S. Census Bureau.

Based on current projections, some 15.5 million women in the U.S. population are likely candidates for petite sizes; close to nine million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. There are an estimated 51.5 million women in the U.S. who are five feet three inches or shorter, but most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

THE POTENTIAL MARKET

Estimated Number of Women 16 Years of Age & Over By Height & Weight, 1984 (In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	94,279	100.0%	21,401	22.7%	41,860	44.4%	31,018	32.9%
Height:								
5'3" or less	51,476	54.6	15,462	16.4	21,496	22.8	14,519	15.4
5'4" - 5'6"	34,035	36.1	5,468	5.8	16,027	17.0	12,539	13.3
5'7" or more	8,768	9.3	471	0.5	4,337	4.6	3,960	4.2

Source: Fairchild Market Research Department based on National Health Survey 1971-1974 (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census projections for 1984 by age.

Working Women

In the next 10 years the number of women of prime working age (25-54) is expected to grow considerably faster than the total labor force. Young workers will decline in absolute numbers as the rate of growth of the total labor force slows markedly. These growth trends reflect the aging of the baby-boom generation and a subsequent sharp decline in birth rates.

The U.S. Bureau of Labor Statistics has recently (November 1983) published revised projections of the labor force for the 1982-95 period. For the middle scenario, which assumes that labor force participation of women will accelerate then taper off, the female civilian labor force is expected to reach 57.2 million by 1990, 8.7 million (or 18%) above the 1983 average.

Participation rates in the labor force among women are expected to continue to grow (except among women over 54), but at a slower rate than prevailed in the 1970's and early 1980's. Over the 1982-95 period, there will be a pronounced shift in the age structure of the labor force. The median age of women in the labor force was 38.3 years in 1970. This dropped to 34.2 years by 1982, but is rising now and expected to reach 36.8 years by 1995 based on the BLS middle series projections.

The Female Civilian Labor Force by Age, 1982-1995

	<u>Labor Force (in thousands)</u>			<u>Participation Rate</u>		
	1982	1990	1995	1982	1990	1995
Women 16 years & older	47,755	57,250	61,417	52.6	58.3	60.3
16 to 24	11,533	10,813	10,557	62.0	69.1	71.6
16 to 19	4,056	3,778	3,761	51.4	56.8	58.2
20 to 24	7,477	7,035	6,796	69.8	78.1	82.0

(continued)

THE POTENTIAL MARKET

Working Women

The Female Civilian Labor Force by Age, 1982-1995 (continued)

	<u>Labor Force (in thousands)</u>			<u>Participation Rate</u>		
	<u>1982</u>	<u>1990</u>	<u>1995</u>	<u>1982</u>	<u>1990</u>	<u>1995</u>
25 to 54	30,149	40,496	44,852	66.3	75.6	78.7
25 to 34	13,393	16,804	16,300	68.0	78.1	81.7
35 to 44	9,651	14,974	17,427	68.0	78.6	82.8
45 to 54	7,105	8,718	11,125	61.6	67.1	69.5
55 & over	6,073	5,941	6,008	22.7	20.5	19.5
55 to 64	4,888	4,612	4,671	41.8	41.5	42.5
65 & over	1,185	1,329	1,337	7.9	7.4	7.0

The dress market should benefit from the expected growth in the number of working women age 35 to 44 years, and 25 to 34 years. By 1990 the former group will register an expected increase of 55% compared with 1982 and a gain of 16% over the 1990 level by 1995. The labor force 25 to 34 years of age is expected to grow 25.5% by 1990 compared with 1982, but will then start to taper off, falling about 3% below the 1990 level by 1995.

Source: U.S. Bureau of Labor Statistics,
Monthly Labor Review
(November 1983)

The proportion of executives, administrators and managers who were women rose from 19% to 31% between 1970 and 1980, according to an analysis of census of population data (compiled by the U.S. Census Bureau). One out of every five working women 25 to 64 years of age is a college graduate today compared with one of eight a decade ago. In March 1983, 77% of all women college graduates were in the labor force, compared with 63% of those who had completed not more than four years of high school and 44% of school drop-outs.

An analysis of the 1980 census of population showed that the 10 occupations with the largest number of women were as follows:

	<u>Number of Women</u>
Secretaries	3,949,973
Teachers (elementary school)	1,749,547
Bookkeepers	1,700,843
Cashiers	1,565,502
Office clerks	1,425,083
Managers, not elsewhere classified	1,407,898
Waitresses	1,325,928
Salesworkers	1,234,929
Registered nurses	1,232,544
Nursing aids	1,209,757

THE POTENTIAL MARKET

Working Women

Of total women 16 and over employed in 1982 (43.3 million), 66.4% were classified as employed in white-collar occupations. This compares with 60.8% of the 1970 total.

Female Employment by Major Occupational Group, 1972, 1982

	1982		1972	
	Thousands	%	Thousands	%
Total, 16 years & older	43,256	100.0%	31,072	100.0%
White-collar workers	28,744	66.4	18,915	60.9
Professional, technical, etc.	7,650	17.7	4,502	14.5
Managers, administrators	3,219	7.4	1,410	4.5
Sales workers	2,985	6.9	2,226	7.2
Clerical & kindred workers	14,890	34.4	10,777	34.7
Blue-collar workers	5,532	12.8	4,776	15.4
Service workers	8,502	19.7	6,838	22.0
Farm workers	478	1.1	543	1.7

Source: U.S. Bureau of the Census,
Population Profile of the U.S., 1982,
Special Studies Series P-23, No. 130.

Some 32 million women are employed in full-time jobs and spend over \$25 billion for work-related clothing, according to trade estimates. Trade reports indicate a growing preference of women in management/office occupations for dresses, as they grow tired of suits.

Specialized Markets

In the first quarter of 1984, the number of marriages in the U.S. registered a gain of 2.7% over the total in the same 1983 period. This follows a decline of 2.0% in the number of marriages in the year 1983 compared with 1982, which marked the first decline in the annual total since 1975.

While the number of marriages showed a drop in 1983, there appeared to be a growing preference for more elaborate weddings, involving dresses for larger bridal parties. June remained the peak month for weddings, accounting for 11.8% of the total, followed by August, with 11.1%.

Demand for maternity dresses has probably leveled off. In the first three months of 1984 the number of live births in the U.S. gained slightly (0.7%) over the comparable 1983 total. An estimated 3,614,000 women gave birth in 1983, 2% fewer than the 1982 total. According to projections prepared by the Census Bureau, the number of women in the childbearing ages will increase only 1% annually in 1984 and 1985, which means that no dramatic increase in the birth totals can be expected.

THE POTENTIAL MARKET

Specialized Markets

Total Marriages & Births in the U.S., 1982, 1983

	<u>Number (thousands)</u>		<u>% Change 1983/1982</u>	<u>Rate Per 1,000 Population</u>	
	<u>1983</u>	<u>1982</u>		<u>1983</u>	<u>1982</u>
Marriages	2,444	2,495	- 2.0%	10.5	10.8
Live births	3,614	3,704	- 2.4	15.5	16.0

Source: U.S. Department of Health & Human Services,
Monthly Vital Statistics Report.

June continues to be the preferred month for weddings, accounting for 11.8% of the annual total in 1983. August is next in popularity, accounting for 11.1% in 1983. The peak month for births was July (9.1% of the total), followed by August (8.9%).

Monthly Pattern in Marriages & Births, 1983

	<u>Marriages</u>		<u>Births</u>	
	<u>Number (Thous.)</u>	<u>% of Total</u>	<u>Number (Thous.)</u>	<u>% of Total</u>
Total	2,444	100.0%	3,614	100.0%
January	132	5.4	307	8.5
February	143	5.9	273	7.6
March	162	6.6	312	8.6
April	185	7.6	285	7.9
May	231	9.4	299	8.3
June	289	11.8	296	8.2
July	228	9.3	328	9.1
August	272	11.1	320	8.9
September	236	9.7	312	8.6
October	195	8.0	306	8.5
November	188	7.7	287	7.9
December	183	7.5	288	8.0

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1982

RETAIL SALES

Trends

Coming out of the doldrums prevailing in recent years, trade reports indicate a strong revival of consumer interest in dresses. Better dress business lead the way, with a strong performance in 1983, followed by gains in moderate-priced dress departments. Retailers and manufacturers who were previously in sportswear have moved into the dress arena, and the sportswear cycle is reported to have ebbed as moderate-priced dresses surge in popularity.

RETAIL SALES

Trends

Working women are a key factor in this development. Dresses offer not only a change, but are favored in place of separates for greater ease in dressing and obtaining a total look, as well as offering a less costly alternative to separates. Then, too, many career women are tiring of the look of tailored suits for office wear, and, with their growing confidence in themselves, turning to a more feminine look. New fabrics have given new ideas to dress designers, further stimulating sales. Dress business, which traditionally peaks in the spring, has become a year-round business.

The upward trend in dress sales is expected to continue. According to Paul Sullivan, DuPont's senior marketing specialist, a projected 212-215 million dresses will be sold in 1984. This compares with the low point of 175 million units in 1976, but is still far below 1969's peak in sales of 365 million units.

According to Apparel Merchandising (April 1984), a Lebhar-Friedman survey among 30 top department store executives showed over half expected their dress business to increase 20% more in the next two years; 29% expected increases of from 10% to 19%. Half of the respondents planned to increase floor space devoted to dresses. Branded lines dominate the moderate-priced dress departments, accounting for about four out of five dresses sold, according to reporting department stores. Private labels represented about 9% and were expected to take a larger share in the next couple of years. Nearly 40% of the dress business of these stores is promotionally-priced or on sale. Career dresses were cited as the fastest-growing type, accounting for an average 60% of the dress department mix. However, as the needs of working women on their way up the career ladder became more sophisticated, gains in dresses for after-five-o'clock wear are expected.

RETAIL SALES BY TYPE OF OUTLET

Pending release of reports based on the 1982 Census of Retail Trade, the latest official information on women's dress sales is contained in the last previous complete census, covering 1977. Only stores with payrolls were included in the merchandise line reports issued by the Census Bureau, but not all store types which sell dresses were required to break down their sales.

According to the census, retail sales of dresses in the major outlet types reporting sales totaled \$5.4 billion. Women's ready-to-wear stores sold \$2.6 billion worth of dresses in 1977, 47.4% of the total. Department store dress sales amounted to \$2.2 billion, or 40.4%.

RETAIL SALES BY TYPE OF OUTLET

Reported Sales of Women's Dresses by Store Type, 1977 (Including Only Stores With Payrolls)

Dress sales reported (mil. \$)	\$ 5,434.9
Percent	100.0%
Women's ready-to-wear stores	47.4
Department stores**	40.7
Family clothing stores	9.0
Mail order houses	2.3
Other apparel stores***	0.6

* Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.

***Includes lingerie shops and other specialized women's apparel outlets, shoe stores, children's wear stores, and stores primarily selling men's wear.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Specialty Stores

Preliminary reports (subject to revision) have been released on the 1982 Census of Retail Trade by the Census Bureau for women's ready-to-wear stores and for family clothing stores. These show the trend compared with earlier census years.

	Family Clothing Stores			Women's Ready-To-Wear Stores		
	1982	1977	1972**	1982	1977	1972**
Number of stores *	17,899	16,025	13,845	44,084	40,227	33,375
Total sales (millions)	\$13,471.4	\$ 7,801.0	\$ 4,814.6	\$20,310.8	\$12,343.7	\$8,307.7
Dress sales***	592.7	491.5	385.2	3,737.2	2,641.5	2,251.4
% to total store	4.4	6.3	8.0	18.4	21.4	27.1

* Includes only establishments with payroll. Leased departments in this classification are counted as separate establishments, and not included with data on stores in which operated in 1972.

** Data for 1972 may be slightly affected by different treatment of leased departments.

*** Includes both women's and girls' dresses.

Source: U.S. Bureau of the Census, RC82-I-16, - 17.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Total sales of women's ready-to-wear stores in 1983 amounted to \$19,685 million, according to the Census Bureau (including both stores with payroll and those without payroll). Sales of family clothing stores were reported at \$11,904 million.

Almost 93% of women's ready-to-wear stores with payrolls in the U.S. operated with fewer than 20 employees and almost three-quarters employed less than 10 persons in 1981, according to the Bureau of the Census.

Women's Ready-to-Wear Stores by Employee Size, 1981 (Including Only Stores With Payroll)

	<u>Establishments</u>		<u>Employees</u>	
	<u>Number</u>	<u>% of Total</u>	<u>Number</u>	<u>% of Total</u>
Women's ready-to-wear stores, total	39,846	100.0%	344,336	100.0%
By establishment size:				
Under 10 employees	29,422	73.8	126,657	36.8
10-19 employees	7,557	19.0	102,512	29.8
20-49 employees	2,379	6.0	67,185	19.5
50-99 employees	370	0.9	25,058	7.3
100 or more employees	118	0.3	22,924	6.6

Source: U.S. Bureau of the Census,
County Business Patterns, 1981.

Typical operating results in specialty stores (primarily women's and family clothing stores) are published annually by the Controllers' Congress, National Retail Merchants Association. In the latest available report covering 1982, the typical dress operation registered a gain of 4.7% in sales compared with 1981, with all the gains centered in misses' dresses, while both women's and juniors' registered declines in the typical (median) operation.

Merchandising & Operating Results of Dress Departments In Specialty Stores With Sales Over \$1 Million, 1983 (Median Results)

	<u>All Adult</u>				
	<u>Female</u>	<u>All</u>	<u>Women's</u>	<u>Misses'</u>	<u>Juniors'</u>
	<u>Apparel</u>	<u>Dresses</u>	<u>Dresses</u>	<u>Dresses</u>	<u>Dresses</u>
	<u>(34)*</u>	<u>(31)*</u>	<u>(9)*</u>	<u>(21)*</u>	<u>(22)*</u>
Net sales, % change from last year	+ 9.5%	+ 5.1%	+ 8.9%	+ 4.9%	+ 7.7%
Sales, % to total store	54.0	4.7	2.0	5.0	1.7
Sales, % of adult female apparel	100.0	7.8	4.0	10.4	3.6
\$ sales per sq. ft. of selling space (main or largest unit)	\$143.9	\$143.4	na	\$121.5	\$89.8
Cumulative markon, %	51.9%	51.6%	54.8%	51.5%	51.7%

(continued)

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Merchandising & Operating Results of Dress Departments In Specialty Stores With Sales Over \$1 Million, 1983 (Median Results) (continued)

	All Adult Female Apparel (35)*	All Dresses (31)*	Women's Dresses (9)*	Misses' Dresses (21)*	Juniors' Dresses (22)*
Gross margin, % of net sales					
including cash discounts	43.5%	40.8%	44.5%	41.1%	43.2%
Markdowns, % of net sales					
including employee discounts	22.1	26.9	24.4	27.2	25.2
Number of stock turns (times)	3.8	3.5	3.3	3.5	4.6

* Number in parentheses is the number of reporting stores in each category.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983.
(1984 Edition)

Department Stores

The U.S. Census Bureau's preliminary report covering findings in the 1982 Census of Retail Trade for department stores do not include information on dress departments. However, the total number of stores was reported at 10,035 compared with 8,807 in 1977. Total sales of department stores in 1983, according to an annual report on retail sales issued by the Bureau showed department store volume totaling \$116.7 billion.

In the NRMA report on typical operating results by departments in 1983, a median gain of 10.8% was reported in sales of dress departments as a whole. This compares with a loss of 0.5% in the typical store in 1982. (The number of stores reporting was somewhat different--97 department stores in 1982, 90 for 1983, which may account for some of the change in the median).

The typical misses dress department last year registered an 11.6% gain in sales compared with 1982. In 1982, the median figure for the department was a loss (-1.4%) compared with 1981.

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Dress Departments in Department Stores With Sales Over \$1 Million, 1983 (Median Results)

	All Adult Female Apparel (95)*	All Dresses (90)*	Women's Dresses (75)*	Misses' Dresses (69)*
Net sales, % change from last year	+ 10.3%	+ 10.8%	+ 8.5%	+ 11.6%
Sales, % to total store	25.9	2.9	0.4	2.9
Sales, % of adult female apparel	100.0	7.1	1.5	10.7
\$ sales per sq. ft. of selling space (main or largest unit)	\$145.5	\$112.1	\$110.1	\$140.3
Cumulative markon, %	51.3%	51.0%	51.0%	51.1%
Gross margin, % of net sales, including cash discounts	43.7	41.0	41.2	40.7
Markdowns, % of net sales, including employee discounts	22.5	26.0	25.6	26.3
Number of stock turns (times)	3.9	3.6	3.5	3.8

	Juniors' Dresses (83)*	Bridal/ Formal Dresses (36)*	Utility Dresses, Aprons & Uniforms (18)*	Maternity Clothing & Accessories (46)*
Net sales, % change from last year	+ 9.3%	+ 1.7%	+ 6.2%	+ 2.1%
Sales, % to total store	0.8	0.2	0.9	0.1
Sales, % of adult female apparel	3.0	0.7	3.9	0.6
\$ sales per sq. ft. of selling space (main or largest unit)	\$ 89.5	\$136.4	\$ 84.5	\$ 86.0
Cumulative markon, %	51.5%	49.5%	51.1%	52.2%
Gross margin, % of net sales, including cash discounts	43.8	36.0	43.5	46.8
Markdowns, % of net sales, including employee discounts	21.9	18.1	22.9	19.3
Number of stock turns (times)	4.6	2.1	4.0	3.0

* Number of reporting stores.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983
(1984 edition)

RETAIL ADVERTISING

Dresses are promoted most extensively in the spring months. According to information compiled by the Advertising Checking Bureau for 1982, March, April and May accounted for 34.1% of the total newspaper ad lineage run on women's and misses' dresses, and almost 42% of the total on juniors' dresses.

Percent of Year's Total Retailers' Newspaper Ad Linage on Dresses Run Each Month, 1982

	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sep.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Total</u>
Dresses													
Women's, Misses'	6.6	8.5	11.5	11.1	11.5	7.3	5.8	8.0	8.9	7.4	7.4	6.0	100.0%
Juniors'	4.3	4.8	13.1	15.5	13.3	7.2	7.9	8.8	4.6	6.6	7.6	6.3	100.0

Source: Newspaper Advertising Bureau Planbook, 1984

CONSUMER PRICE TRENDS

During the first six months of 1984, the Consumer price index for all urban consumers (CPI-U) for dresses rose at a seasonally adjusted annual rate of 2.0%, compared with a decline of 4.5% in price levels for all women's apparel, according to the U.S. Bureau of Labor Statistics. The gains, however, were concentrated in the early months of the year. The June 1984 index was 1.6% below the seasonally adjusted index for May.

CPI-U For Women's Dresses & All Women's Apparel

	Annual Average		% Change 1983/1982	Seasonally Adjusted Annual Rate -- % Change:	
	<u>1983</u>	<u>1982</u>		<u>3 Mo. Ending June 1984</u>	<u>6 Mo. Ending June 1984</u>
All items	298.4*	289.1*	+ 3.2	+ 3.3%	+ 4.1%
Women's apparel	107.5**	105.5**	+ 1.9	- 4.4	- 4.5
Dresses	165.2	159.8*	+ 3.4	- 5.6	+ 2.0

* 1967 = 100

** 12/77 = 100

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following information on consumer purchases has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The findings are based on an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. The tables on dresses of all types cover purchases made for women age 14 and older.

In the twelve-month period ending June 1984, reported purchases of dresses were down 2.3% in units compared with the same period a year earlier. Dollar expenditures, however, were up 5.45%--reflecting both price increases and trading up.

CONSUMER BUYING HABITS

Percent of Households Purchasing Specified Apparel Each Month, 1981

	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Dresses, suits, skirts & blazers	9.7%	8.3%	9.6%	15.2%	13.2%	12.7%	13.0%	12.3%	10.6%	10.8%	9.7%	12.1%

Source: National Panel Diary, quoted in 1984
Newspaper Advertising Planbook, Newspaper
 Advertising Bureau.

In the twelve-month period ended June 1984, specialty stores held a 37.6% share of dollars spent on dresses and 29.5% of dress unit sales. Department stores were the next most popular outlet for dress purchases. They accounted for 33.8% of dollars spent and 28.0% of units purchased by NPD panel members over this period.

Percent of Women's Dress Purchases by Outlet Type July 1982-June 1984, Year 1981

	Units			Dollars		
	July 1983 June 1984	July 1982 June 1983	1981	July 1983 June 1984	July 1982 June 1983	1981
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	28.0	28.1	26.0	33.8	33.6	32.2
National chains	17.9	17.5	17.6	12.4	13.0	12.6
Specialty stores	29.5	28.0	29.5	37.6	35.6	38.4
Discount stores, incl. K-mart	16.1	17.2	17.5	9.2	9.4	9.8
All other retailers, including mail order	8.5	9.2	9.4	7.0	8.4	7.0

Source: NPD Special Industry Services,
 Textile and Apparel Market Index

A surprisingly large share of reported purchases of dresses on all types cost under \$20 (47.5% in the twelve-month period ending June 1984). On the other end of the scale, a growing percentage of dresses cost upwards of \$40. These accounted for over 18% of units bought in the 1984 period, compared with 16.2% in the twelve months ending June 1983 and about 15% in the year 1981.

Dresses costing \$40 or more accounted for 44.7% of dollar expenditures in the twelve months ending June 1984 compared with 39.7% in the previous twelve months and 38.2% in the year 1981.

CONSUMER BUYING HABITS

Percent of Women's Dress Purchases by Price Points July 1982-June 1984, Year 1981

	Units			Dollars		
	July 1983	July 1982	1981	July 1983	July 1982	1981
	June 1984	June 1984		June 1984	June 1983	
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
By retail price points:						
Under \$20	47.5	48.0	54.2	21.0	21.7	26.2
\$20 - 29.99	23.8	23.4	20.5	21.2	22.2	20.6
\$30 - 39.99	10.6	12.4	10.6	13.1	16.4	15.1
\$40 - 49.99	6.8	6.3	5.7	10.8	10.6	10.4
\$50 - 79.99	7.1	7.4	6.7	15.7	17.7	16.7
\$80 & over	4.2	2.5	2.3	18.2	11.4	11.1

On an overall basis covering all types of dresses, May, June and July were the most important months for dress purchases, according to NPD data.

Percent Distribution of Women's Dress Purchases by Months, July 1982-June 1984

Period	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Total
Units													
1984	5.3	6.4	8.9	9.7	12.2	12.2	11.1	8.7	5.3	7.1	6.0	7.2	100.0%
1983	5.5	6.0	9.2	10.9	12.9	10.8	10.8	8.6	5.9	6.4	6.2	6.6	100.0
Dollars													
1984	4.5	6.6	9.4	10.7	11.1	10.4	9.2	7.9	5.3	8.4	7.0	9.5	100.0
1983	4.8	5.4	9.9	10.9	14.0	9.9	9.2	7.6	7.0	7.3	7.1	6.9	100.0

Seventeen Magazine's spring apparel buying survey, conducted annually for the magazine, obtained 1983 purchase information from 1,027 teen girls on Seventeen's 2,000-member Consumer Panel, which represents a cross-section of the female teenage market.

Based on the actual number of dresses purchased by respondents, a projected number of almost 42 million dresses worth an estimated \$1.6 billion at retail, were bought by a total of 11.8 million teenage girls in 1983.

Dress Purchases by Teenage Females, Spring 1983 (Projected to Total Teenage Market)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses, by type			
School			
Above knee-length	4,733	5,585	\$175,648
Below knee-length	4,642	6,313	197,092
Knee-length	3,628	8,054	271,339

(continued)

CONSUMER BUYING HABITS

Dress Purchases by Teenage Females, Spring 1983 (Projected to Total Teenage Market) (continued)

	<u>Number Purchasing (000)</u>	<u>Number Purchased (000)</u>	<u>Total Expenditures (000)</u>
Dresses, by type (cont'd)			
Date			
Above knee-length	3,706	6,856	\$260,871
Below knee-length	3,589	4,307	156,947
Knee-length	2,666	5,279	199,546
Ankle-length	143	147	5,458
Formal gowns	3,940	3,979	271,408
Jumpers	917	1,082	22,993
Projected totals	11,859	41,602	\$1,561,302

A trend to shorter skirt lengths has been reported in WWD for spring 1985, and this gets verification in Seventeen's 1983 Spring Apparel Survey. At the time of the study (May 1983) 14.9% favored skirt lengths just above the knee compared with 5.4% in 1982. This was the highest percentage favoring this length since 1976 when it reached 20.8%. Skirts just below the knee were favored by the biggest share in 1983 (46.5%), down sharply, however, from the 63.2% favoring this length in 1982.

Skirt Length Trends

	<u>1983</u>	<u>1982</u>	<u>1981</u>	<u>1976</u>
Just below knee	46.5%	63.2%	80.8%	36.1%
At the knee	17.1	12.7	10.9	32.4
Just above the knee	14.9	5.4	1.3	20.8
Any/all lengths	13.5	9.7	1.4	4.5
Midi	6.5	7.7	5.1	2.9
Ankle-length	1.5	1.3	0.5	1.2
Mini	--	--	--	1.9
Total	100.0%	100.0%	100.0%	100.0%

Department stores are favored by teen girls for their dress purchases, according to the survey. Over 63% said they usually purchase their dresses in these stores. Boutique/specialty stores followed in popularity (39.4%). Comparable figures in the 1983 Spring Apparel Survey were 61.6% and 39.7%, respectively.

CONSUMER BUYING HABITS

Usual Place of Purchase of Dresses, 1981, 1983

	<u>% of Respondents</u>	
	<u>1983</u>	<u>1981</u>
Department store	63.4%	61.6%
Boutique/specialty store	39.4	39.7
Discount store	3.2	4.7
Variety store	3.2	3.8
Mail order	4.5	4.4
Other	4.5	2.8
Total	100.0%*	100.0%*

* Total adds to more than 100.0% due to multiple mentions.

Source: Seventeen Magazine
1982, 1983 Spring Apparel Studies

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

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DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying head-quarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of \$50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

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